

Subject: Standard Operating Procedure - Task Request Submissions under the Lockheed Martin Federal Systems (LMFS) Modern Defense Civilian Personnel Data System (DCPDS) Contract

1. **Background:** The current LMFS contract and Statement of Work (SOW) allow the consideration of service task order requests that are in addition to the base contract. These additional task orders may include, but are not limited to: approved system support services; service/support for non-DoD customers; in-place Component-unique requirements; and optional use for obtaining hardware and software related to the modern Defense Civilian Personnel Data System (DCPDS). DoD Components have the option of using other contract vehicles for Component-unique requirements, services, and equipment so long as these purchases do not degrade the standardization of the modern DCPDS, negatively affect the operations of the modern DCPDS core functionality, or violate the provisions of the Clinger-Cohen Act.

2. **Purpose:** The purpose of this standard operating procedure is to establish procedures for Component task order consideration under the LMFS modern DCPDS contract, provide a template for the task order requests, and clarify responsibilities for processing modern DCPDS customer task order requests. Civilian Personnel Management Service (CPMS) and Component action officers will identify, review, and process system change requests (SCRs) that are outside the base contract using this guidance. SCRs that are covered by the contract will be assigned to the Change Control Board (CCB); problem reports (PRs) will be worked through the established PR procedures. This process will be used for all non-DoD customer task requests as well as for all Component-unique requests not adopted or authorized as part of the modern system baseline.

3. **Task Order Process:**

a. A task order request is prepared by the pertinent Component program representative. Information concerning the requirement, the estimated cost, the point of contact (POC), and other necessary information will be provided using the template attached. The request is forwarded to the CPMS, Regionalization and Modernization (Reg/Mod) Division. The Component POC will act as a liaison between the Component, CPMS actions officers, and the CPMS Contracting Officer Technical Representative (COTR) on any submitted task order request.

b. The Reg/Mod Division is responsible for identifying and ensuring the adequacy of submitted requirements. The submission must include functional and technical requirements, an independent cost estimate (ICE), and a funding document. Reg/Mod will forward the submission to the CPMS, Business Management Division (BMD), for a preliminary contract coverage determination and for funding document review and to the Vendor Management Office (VMO). In conjunction with the VMO, Reg/Mod and BMD will concomitantly determine

whether the task order request should be submitted to the appropriate contracting office or referred to the CCB. This determination will normally be made within one week of receipt. If the request is forwarded to the CCB, no further action will be taken under the provisions of this instruction; it will be processed in accordance with the CCB Charter. Component-unique requirements that are outside the scope of the CCB charter and do not degrade standardization, compete with core functionality, negatively affect the operations of modern DCPDS core functionality, or violate the Clinger-Cohen Act are forwarded to the appropriate contracting office for processing. Conversely, Component-unique requirements that do not meet this requirement may not be considered for development or implementation.

c. The VMO staff and the COTR will determine that the task order request package is complete, take necessary corrective action when it is not, and certify to BMD that it is ready to forward. BMD will ensure that the appropriate funding documents are completed and included in the task request package. The BMD staff will forward the approved package to the contracting office.

d. The contracting office (support currently provided by the Defense Logistics Agency) will forward the task to LMFS for consideration and bid. The contracting office will coordinate this effort with the VMO staff and the COTR and determine whether the VMO staff should sponsor an oral presentation by the Vendor. Finally, the contracting office will collect the Vendor's technical proposal and formal bid to forward to CPMS, Reg/Mod, VMO, BMD, and COTR.

e. CPMS will forward the bid package to the submitting customer for technical evaluation and acceptance or rejection. The COTR will coordinate actions within CPMS and conduct any direct discussion with the Vendor. The customer will perform and document the technical evaluation to accept or reject the bid and inform the COTR of the decision.

f. The COTR will forward accepted bids through BMD (with information copies to Reg/Mod and VMO) to the contracting office to amend the task order, which results in formal notification to the Vendor.

4. The CPMS Reg/Mod Division, VMO, and BMD chiefs will appoint primary and alternates for each function assigned under this procedure. The VMO is the proponent for this procedure.

t/s//Ginger Groeber
CPMS, Director

July 14, 2000
Date

Task Order Request Template

Executive Summary

1. Agency Point of Contact

- Identify candidates for Contracting Officer's Technical Representative (COTR) and Contracting Officer's Representative (COR) (these have specific training requirements)
- Component COTR and COR appointed by the appropriate Contracting Officer

2. Delivery Order Title

- Specific to your organization
- Used to track contract

3. Introduction and Background

- General overview of your organization
- Specific functions supported by the request

4. Objectives

- Technical environment
- Purpose, goals, and expectations

5. Scope

- Relevant concept of operations (CONOPS)
- Roles and responsibilities
- Service level requirements and performance measures
- Government furnished equipment/information (GFE/GFI)
- Contractor furnished equipment (CFE)
- Projected travel requirements

6. Specific Tasks

- Overview
- Deliverables
- Reporting requirements

7. Place of Performance

- Specific work site
- Each deliverable

8. Period of Performance/Contract Type

- Duration of contract
- Each deliverable
- Expected contract type (firm-fixed price or time and materials)

9. Deliverable/Delivery Schedule

- Timeframes and schedules
- Each deliverable
- Acceptance criteria

10. Security

- Specify security requirements
- Each deliverable

11. Accounting and Appropriation Data

- POC
- Billing instructions
- Completed funding document